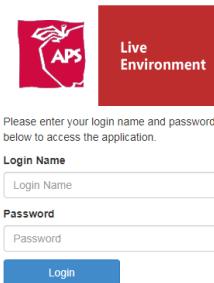
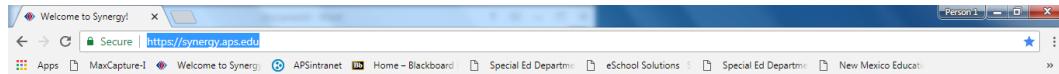


Using Synergy: Special Education Therapists

Adapted from "Synergy Special Education Teachers/Therapists" 2018

How do I log in?

- Use the following browsers to access Synergy: Internet Explorer, Chrome, Firefox. Do not use Safari.
- In your browser bar, type in synergy.aps.edu
- Pop-up blocker must be turned off for synergy.aps.edu
- Login Name – the same as you use for email
- Password – the same as you use for email
- If you are having trouble logging in, please contact Tommie, Matilda, Denette, or Bonnie.

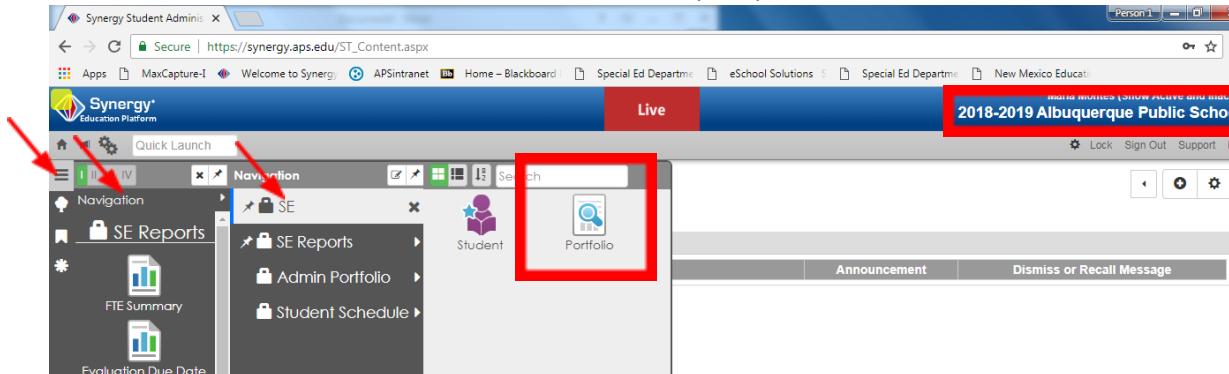


What can I see in Synergy?

- Different role groups have different access
 - Special Ed therapists can view and update IEP-related documents and access to evaluations for sp ed students across the district.
 - THERAPISTS need to check to be sure there is a finalized IEP in Synergy for each of their students and then send those names and IDs to sped.data@aps.edu if their Portfolio view is inaccurate. Therapists need to only send changes, not entire lists (only students to add or remove).
- Before you attempt to view anything in Synergy SE, you need to be sure your focus (top right of your screen) is set properly (correct location, correct school year, and whether you want to see active students only or both active and inactive)
 - Active means the student is currently enrolled at an APS site
 - Inactive means the student is not currently enrolled at an APS site
- THERAPISTS – Be sure to set your focus to Albuquerque Public Schools if you serve students at more than one school and want to see all your students.
- Color codes for documents
 - RED = not started (or an amendment was just finalized)
 - YELLOW = draft (Please note that after the first IEP, the IEP icon will always contain a copy of what was just finalized.)

- BLUE = Amendment in process

- Please see screenshot below to see how to access your portfolio:



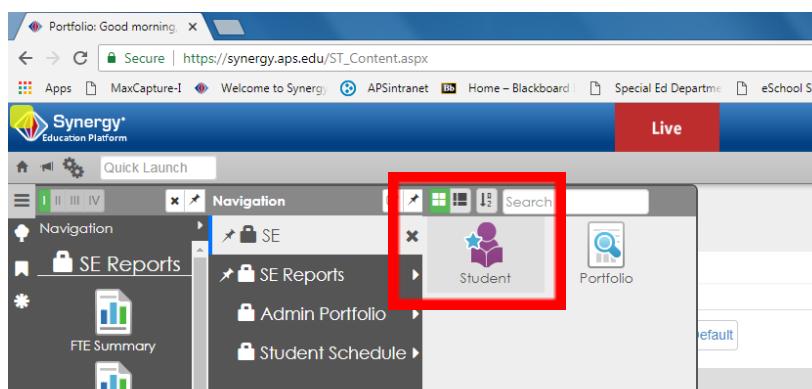
- Snap shot of Portfolio List View:

The screenshot shows the 'Portfolio List View'. At the top, there is a search bar with 'Role' and buttons for 'Save Default' and 'Reset Saved Default'. Below the search bar is a table with the following columns: Student Name, Grade, Team, Ad Hoc Docs, Historical Docs, IEP, Prg, Process Docs (IEP, PWN, MED), A-R Date, and R-E Date. Each row represents a student record with various status indicators (e.g., IEP, PWN, MED icons). A red box highlights the 'Process Docs' column.

Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	IEP	Prg	Process Docs			A-R Date	R-E Date
							IEP	PWN	MED		
	01	Edit	Edit	View	IEP	PRS	●	●	●	09/06/2018	09/06/2020
	C3	Edit	Edit	View	IEP	PRS	●	●	●	12/03/2018	12/03/2020
	05	Edit	Edit	View	IEP	PRS	●	●	●	04/02/2019	04/12/2020
	06	Edit	Edit	View	IEP	PRS	●	●	●	12/13/2018	01/08/2020
	11	Edit	Edit	View	IEP	PRS	●	●	●	01/23/2019	01/23/2021
	10	Edit	Edit	View	IEP	PRS	●	●	●	01/11/2019	01/12/2020
	08	Edit	Edit	View	IEP	PRS	●	●	●	02/07/2019	04/21/2019
	0A	Edit	Edit	View	IEP	PRS	●	●	●	01/08/2019	01/22/2020

How do I see the documents for a particular student?

- If the student is on your caseload, click on the student's name in the Portfolio view
- If the student is **not** on your caseload, click on Student (purple student with blue star) in the left sidebar and search for a student. (Get into search mode by clicking the magnifying glass. **You know you are in search mode if the boxes are a pale yellow.**) → See screenshot below
 - The ID number is the best way to locate a student. If you type in just a last name, Synergy will provide the student with the closest match. Please verify that it is the student you want before you start working on their documents.



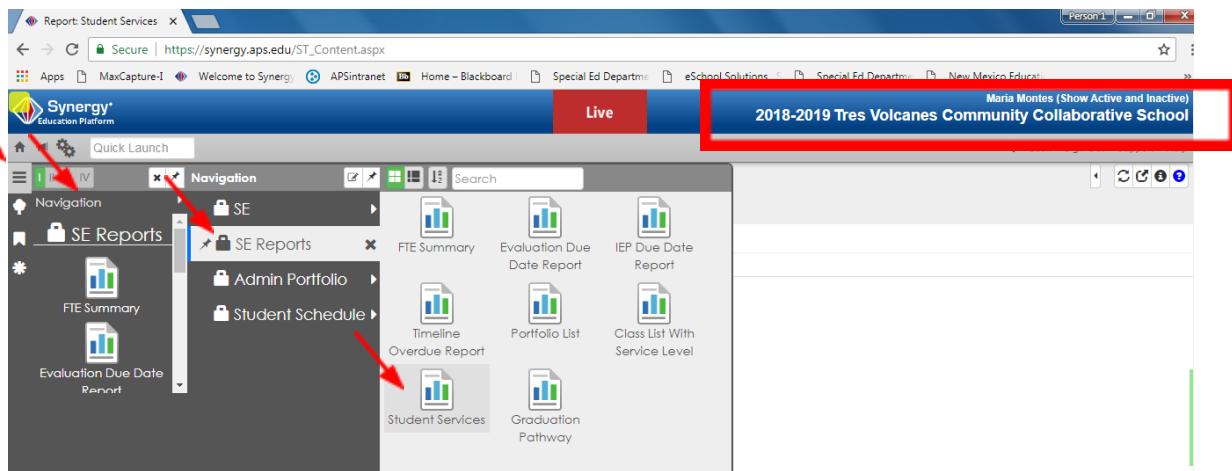
- Click on the tab with the information you need
 - Demographic
 - Parent
 - Team (names of case manager and assigned therapists), Ad-Hoc (access to a few specialized documents)
 - Historical Docs (access to any documents finalized in Synergy or uploaded into Synergy)
 - Process Docs (basic special education data, such as eligibility and due dates plus documents for the student in the current process)
 - Timeline (IEP, Reevaluation, 60 day consent to testing for initials)
 - Student Contact Log

What if a student is missing from my caseload?

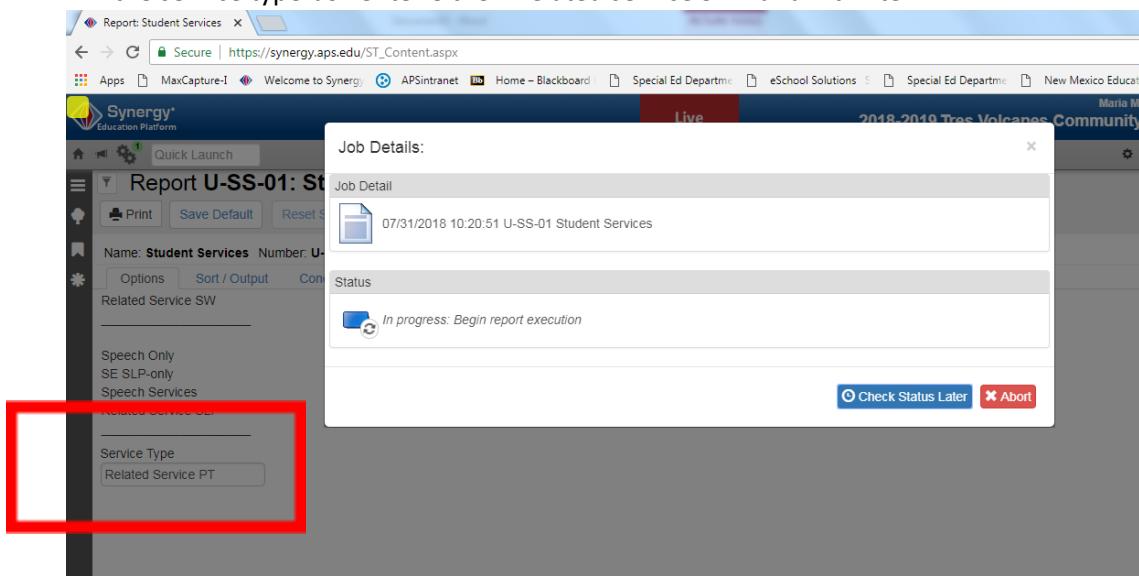
- The student may be a transfer student from outside the district. We are obligated to serve the student under the previous IEP until a new IEP is held.
- When they first arrive, they will be placed in the Transfer process. After that document is finalized, the student moves to Annual Review. An IEP needs to be finalized within 30 days of the transfer student's enrollment.

How do I check for students that are receiving SW services at each school site? (Not all student may appear on Portfolio List)

- Change school focus on the far right and click save (page will refresh)
- Hover over the three line icon, Navigation, SE Reports, click on Student Services (see screenshots below):



- In the service type box enter either “related service SW” and hit Enter



- List of students at each particular school site with therapy hours:

The screenshot shows a PDF report titled "Tierra Antigua Elementary School Student Services" for the year 2018-2019, Report U-SS-01. The report includes a table with student information and therapy hours. The table has columns for ID, Name, Grade, Service Type, and Minutes Per. The data is as follows:

ID	Name	Grade	Service Type	Minutes Per
[REDACTED]	[REDACTED]	01	Related Service PT	120 Monthly
		K	Related Service PT	120 Monthly
		K	Related Service PT	120 Monthly
		01	Related Service PT	120 Monthly

How do I check if students are receiving SW but unassigned at my school?

- Keep focus set to your school
- Select “hamburger” or the 3 horizontal bars at top left corner.
- Select SE Reports
- Select Admin Portfolio
- In the drop down menu, enter Social Worker as the role and click filter.
- A list will populate with all students at that school with SW Services, including those without a SW attached.

Synergy Education Platform

Live

Jessie Macfarland (Show Active and Inactive)
2021-2022 Manzano High School

Lock Sign Out Support Help

Bookmarks

U-SS-01: Student Services

Admin Teacher Portfolio

Admin Student Portfolio

Query

Admin Teacher Portfolio

Selection Criteria

Role: Social Worker

Filter Clear All Filters

Staff

Line	Staff Name	Student Count	Next IEP Due Date
1			

How do I get to previous MET/IEP/PWN?

- Click on student name on your Portfolio List

Portfolio: Good morning x

Secure | https://synergy.aps.edu/ST_Content.aspx

Good morning, Maria Montes

Live

Maria Montes (Show Active and Inactive)
2018-2019 Albuquerque Public Schools

Lock Sign Out Support Help

Portfolio

Sort: Name

Role: Annual Review

Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	IEP	Prg	Process Docs	A-R Date	R-E Date
1		01	Edit	Edit	View	IEP	PRG	IEP PWN MED	09/06/2018	09/06/2020

- Click on Historical Documents

Demographics Parents Team Ad Hoc Documents Historical Documents Process Docs Timeline Student Contact Log

Last Name First Name Middle Name Suffix Student ID Gender

- Click on the folder icon corresponding to the date you are looking for

Grade
01

Historical Documents

Line	Start Date	IEP Date	End Date	Process Name	Documents
1	08/22/2017	03/23/2018	09/07/2017	Reevaluation	
2	08/17/2017	08/22/2017	08/22/2017	Annual Review	

Attached Documents** Show Detail + Add

- Click on “View” corresponding to the document you would like to open

08/22/2017  Reevaluation

Historical Document Sort By: 

Historical Documents

Line	Document Date	Process	Document ID	Document Name	Status	Action
1	03/23/2018	Reevaluation	IEP	IEP Amendment	Current	View
2	03/23/2018	Reevaluation	Progress Report	Progress Report		View
3	03/23/2018	Reevaluation	PWN	Prior Written Notice of Proposed Actions		View
4	09/07/2017	Reevaluation	IEP	IEP	Previous	View
5	09/07/2017	Reevaluation	Progress Report	Progress Report		View
6	09/07/2017	Reevaluation	MET	Multidisciplinary Evaluation Team		View
7	09/07/2017	Reevaluation	PWN	Prior Written Notice of Proposed Actions		View
8	08/25/2017	Reevaluation	AUT-R NM	Eligibility Criteria - Autism (Re-eval)		View
9	08/25/2017	Reevaluation	Notice	Consent to Evaluate		View

Demographics Parents Team Ad Hoc Documents Historical Documents **Process Docs** Timeline Student Contact Log

Last Name First Name Middle Name Suffix Student ID Gender

- Click on colored shape (far left) to corresponding document you need to open and input information

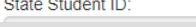
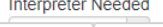
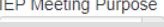
Current Process: Annual Review

Process Documents

Cover Medical PLAAFP Special Cons. Goals Services Supl. Aids & ESY Testing LRE Parent St.

Dates

Re-evaluation Due Date: 09/06/2020  IEP Date: 09/06/2018  IEP Review Due Date: 09/05/2019  Process Name: Annual Review Display 'DRAFT'

State Student ID:  Interpreter Needed:  IEP Meeting Purpose: 

Attached Documents* Show Detail + Add

- Click on corresponding tab

How do I add progress reports?

- Click on student name
- Click on Process Docs
- Click on Progress Reports

Current Settings

Previous IEP Date 09/07/2017	Previous Eval Date 09/07/2017	Primary Disability AUTISM
IEP Review Due Date 09/06/2018	Re-evaluation Due Date 09/06/2020	Secondary Disability
		Tertiary Disability
		Quaternary Disability

Current IEP **Progress Report**

- Click on Add

School

School of Attendance Tierra Antigua Elementary School
School Type

Progress Period **+ Add**

Line	Progress Date	School	Progress
1	11/08/2017	Tierra Antigua Elementary School	Progress
2	02/23/2018	Tierra Antigua Elementary School	Progress
3	05/14/2018	Tierra Antigua Elementary School	Progress
*	07/31/2018		Progress

- Once you have saved “Progress” comes up for that specific date. Click on “Progress”.
- Scroll down to find your goal and enter progress toward goals

Miscellaneous Tips

- MaxCapture – All questions should be directed to Joann Sanchez (sanchez_joa@aps.edu)
- Synergy will lock you out if you haven’t hit the Save button within 25 minutes. It doesn’t care if you are typing. When you reenter your password you have 10 more minutes to hit the Save button before you lose everything you just typed. Save often.
- When you successfully finalize an IEP, it goes directly to Historical Documents. The IEP icon for that student stays yellow. This is not a mistake but is the way Synergy is set up. The yellow icon contains an exact copy of the IEP you just finalized, with the exception of dates. Synergy is letting you know that this IEP copy is ready for the next annual review. If you ever want to verify that the IEP was finalized and moved to Historical Documents, just go to Historical Documents and see if it is there.